

出版事務 Publication



建議專頁

 **Hong Kong Chamber of Insurance Intermediaries**
贊助

Hong Kong Chamber of Insurance Intermediaries 香港保險中介人商會 (HKCII) was incorporated on 7...



Hong Kong Chamber of Insurance Intermediaries
機構
101 人對此讚好。

讚好專頁

出版事務：出版「會訊」、「年刊」及將資訊於商會網站及商會面書發布

Publication: Other than the yearbooks and news bulletins, HKCII also communicates with its members and associates by HKCII website and facebook pages.

網站HKCII website：

<http://www.hkcii.org>

面書HKCII facebook：

<https://www.facebook.com/HongKongChamberOfInsuranceIntermediaries>

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Miriam
理賠經理



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AXA 安盛

引領 / 新標準



HONG KONG CHAMBER OF INSURANCE INTERMEDIARIES
STATEMENT OF COMPREHENSIVE INCOME
FOR THE YEAR ENDED 30 JUNE 2014

	Notes	2014 HK\$	2013 HK\$
INCOME			
Advertising income		161,300	163,010
Bank interest income		3,661	3,026
Membership subscription and entrance fee		63,200	76,350
Surpluses on Chamber's activities, net		33,119	55,088
		<u>261,280</u>	<u>297,474</u>
Less: EXPENDITURE			
Accountancy fee		2,500	2,000
Administrative expenses		90,000	86,800
Auditors' remuneration		6,500	6,000
Business registration fee		550	450
Donation		6,000	–
Exam fee		2,438	–
Insurance		624	–
Office equipment		–	8,236
Newspaper advertising		–	11,680
Printing and stationery		3,220	8,598
Sundry expenses		27,767	9,595
Telecommunication		–	826
Website		1,800	–
Year book publication		52,920	82,139
		<u>194,319</u>	<u>216,324</u>
SURPLUS BEFORE TAX			
		66,961	81,150
INCOME TAX EXPENSE	5	(776)	(2,890)
SURPLUS FOR THE YEAR			
		<u>66,185</u>	<u>78,260</u>



**HONG KONG CHAMBER OF INSURANCE INTERMEDIARIES
STATEMENT OF FINANCIAL POSITION AS AT 30 JUNE 2014**

	Notes	2014 HK\$	2013 HK\$
NON-CURRENT ASSETS			
Property, plant and equipment	6	1	1
CURRENT ASSETS			
Accounts receivable		25,300	13,300
Interest receivable		1,177	1,170
Income tax recoverable		6,404	–
Fixed deposit		611,751	608,097
Bank balances		232,062	192,293
		876,694	814,860
CURRENT LIABILITIES			
Accruals		(9,560)	(16,060)
Deferred income		(15,000)	–
Income tax payable		–	(12,851)
		(24,560)	(28,911)
NET CURRENT ASSETS		852,134	785,949
NET ASSETS		852,135	785,950
GENERAL FUND			
Accumulated surplus		852,135	785,950

The financial statements were approved and authorised for issue by the Executive Committee on 1 December 2014.

President

Treasurer

香港保險業務統計數字

Statistics on Hong Kong Insurance Business

獲授權保險公司數目 Number of Authorized Insurers (31/12/2014)	
一般業務 General	95
長期業務 Long Term	44
綜合業務 Composite	19
總數 Total	158

保險中介人數目 Number of Insurance Intermediaries (31/12/2014)	
保險代理登記數目 Number of Registered Insurance Agents	
保險個人代理人 Individual Agents	46,079
保險代理商 Responsible Officers / Insurance Agencies	2,480
負責人及業務代表 Technical Representatives	27,468
保險經紀登記數目 Number of Registered Insurance Brokers	
獲授權保險經紀 Insurance Brokers	657
授權保險經紀的行政總裁 / 業務代表 Chief Executives / Technical Representatives	9,736

香港保險業務 Hong Kong Insurance Business	
	2013
一般保險業務的毛保費 General Business Gross Premium	418 億港元
長期保險業務的毛保費 Long Term Business Gross Premium	2,577 億港元
香港保險業的毛保費總額 Hong Kong Insurance Gross Premium	2,995 億港元

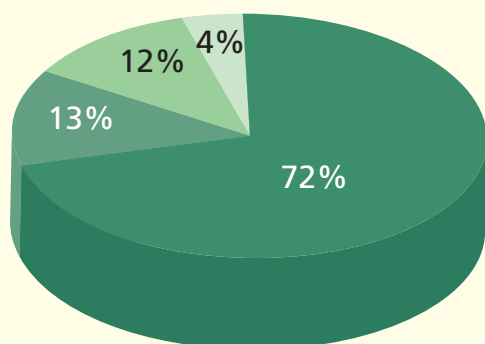
本報告是根據保險業監督資料編輯而成，只作參考，並不保證準確。更詳盡的統計數字資料可從保監處的互聯網站下載。
 This report is based on data compiled from the Insurance Authority. It is for reference only and does not guarantee accurate. More detailed information can be downloaded from the website of IA.



就業人口

The Employed Population

2014年第3季 (2014 Third Quarter)



參加強積金計劃 Joined MPF schemes	72%
參加其他退休計劃 Joined other retirement schemes	13%
無須參加本地退休計劃 Not required to join any local retirement scheme	12%
應參加強積金計劃但尚未參加 Should join but have not yet joined any MPF scheme	4%

* 經四捨五入後，各項百分比的總和未必等同100%。
Percentages may not sum up to 100% due to rounding.

根據香港特別行政區政府統計處公布之2014年第3季《綜合住戶統計調查按季統計報告》，在本港379萬就業人口中，僱員及自僱人士¹的數目分別佔346萬及31萬，另外約有1萬3千人為無酬家庭從業員。

在就業人口中，有72%獲強積金計劃保障，13%受其他退休計劃保障，如公務員退休金計劃及獲強積金豁免的職業退休計劃等。12%就業人口並沒有法律責任參加任何本地退休計劃。他們大部分均為家務僱員及65歲以上或18歲以下的僱員。其餘4%的就業人口為應參加強積金計劃但尚未參加的人士。

According to the Q3 2014 Report on General Household Survey published by the Census and Statistics Department, HKSAR, Hong Kong's employed population of 3.79 million was made up of 3.46 million employees and 0.31 million self-employed persons¹(SEPs). In addition, around 13000 persons were unpaid family workers.

Among the employed population, 72% are covered under MPF schemes and 13% are covered under other retirement schemes, such as Civil Service Pension Scheme, and MPF exempted ORSO schemes, etc. Twelve percent of the employed population, most of them domestic employees and employees who are aged above 65 or below 18, are not required to join any local retirement scheme according to law. The remaining 4% of the employed population are people who should have joined MPF schemes but have not done so.

強積金中介人

MPF Intermediaries

截至2014年12月31日，共有32251名註冊強積金中介人，當中主事中介人佔389名，附屬中介人佔31862名。

As at 31 December 2014, there were 32251 registered MPF intermediaries, comprising 389 principal intermediaries and 31862 subsidiary intermediaries.

資料來源Sources of Data: 強制性公積金計劃管理局Mandatory Provident Fund Schemes Authority

¹強積金制度下的自僱人士，包括政府統計處《綜合住戶統計調查按季統計報告》中界定的「自營作業者」及「僱主」。

Self-employed persons under the MPF System include both "self-employed persons" and "employers" as defined in the Quarterly Report on General Household Survey, Census and Statistics Department.

常見保險、投資或精算專業資格／課程

LIST OF INSURANCE, INVESTMENT, OR ACTUARIAL QUALIFICATIONS / EXAMINATIONS

專業機構 Professional Bodies	專業名銜 Professional Designation		網址 Website
Chartered Insurance Institute 英國特許保險學院	Associate 院士	ACII	http://www.cii.co.uk
	Fellow 資深院士	FCII	
Australian and New Zealand Institute of Insurance and Finance 澳大利亞及新西蘭保險與金融學會	Senior Associate 資深準會員	ANZIIF (Snr Assoc)	https://www.theinstitute.com.au
	Fellow 高級會員	ANZIIF (Fellow)	
Life Office Management Association 美國壽險管理學會	Fellow 會士	FLMI	http://www.loma.org/ http://www.loma.com.hk
The American College of Finance Services 美國學院	Chartered Life Underwriter 特許壽險承保人	CLU	http://www.theamericancollege.edu
	Chartered Financial Consultant 美國特許財務顧問	ChFC	http://www.theamericancollege.edu
Financial Planning Standards Board Ltd. 國際金融理財標準委員會	Certified Financial Planner 認可財務策劃師	CFP	https://www.fpsb.org
The Institutes 美國特許財產保險學會	Chartered Property Casualty Underwriter 會士	CPCU	http://www.theinstitutes.org
CFA Institute CFA協會	The Chartered Financial Analyst 特許金融分析師	CFA	http://www.cfainstitute.org/ http://www.hksfa.org
	Certificate in Investment Performance Measurement 投資表現衡量證書	CIPM	
Institute of Actuaries of England 英國精算師學會	Fellow 會員	FIA	http://www.actuaries.org.uk
Faculty of Actuaries in Scotland 蘇格蘭精算師學會	Fellow 會員	FFA	http://www.actuaries.org.uk
Institute of Actuaries of Australia 澳洲精算師學會	Fellow 會員	FIAA	http://www.actuaries.asn.au
Society of Actuaries of the United States of America 美國精算師公會	Fellow 會員	FSA	http://www.soa.org
Life Underwriters Association of Hong Kong 香港人壽保險從業員協會	Fellow Chartered Financial Practitioner 特許財務策劃師	FChFP	http://www.luahk.org
Hong Kong Society of Certified Insurance Practitioners 香港保險師公會	Hong Kong Insurance Professional Qualification Examination 香港保險師專業試	HKIPQE	http://www.hkcip.org.hk
Life Underwriter Training Council 美國壽險訓練學院	Fellow 院士	LUTCF	http://www.naifa.org
Vocational Training Council 職業訓練局	Professional Diploma in Insurance Programme 專業文憑課程 - 保險學	PDI	http://www.vtc.edu.hk
Insurance Institute of Hong Kong 香港保險學會	Hong Kong Diploma in Insurance Studies 保險學 - 香港文憑		http://www.iihk.org.hk
Hong Kong Securities and Investment Institute 香港證券及投資學會	Foundation Programme Examination 基本課程考試	FPE	http://www.hksi.org
	Diploma Programme Examination 文憑課程考試	DPE	
	HKSI Practising Certificate 從業員資格證書		
	HKSI Specialist Certificate 高級從業員資格證書		
	HKSI Professional Diploma in Financial Markets 金融市場專業文憑		



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Hong Kong 香港		
Hong Kong Chamber of Insurance Intermediaries (HKCII) 香港保險中介人商會	8108 1238	8108 1282
Chinese Insurance Association of Hong Kong Ltd. 香港華商保險公會有限公司	2815 7700	2541 0615
Chinese Underwriters Club (CUC) 保險從業華員會		
LOMA Society of Hong Kong (LOMA) 香港壽險管理學會	6017 2233	
General Agents and Managers Association of HK Ltd. (GAMA) 香港人壽保險經理協會	2893 9699	2832 9822
Hong Kong Confederation of Insurance Brokers (CIB) 香港保險顧問聯會	2882 9943	2890 2137
Hong Kong Federation of Insurers - Insurance Agents Registration Board (HKFI) 香港保險業聯會-代理登記委員會	2520 1868	2520 1967
Hong Kong General Insurance Agents Association Ltd. (GIAA) 香港一般保險代理協會	8108 1909	8103 1909
Hong Kong Society of Certified Insurance Practitioners (HKCIP) 香港保險師公會		
Independent Financial Advisers Association Limited (IFAA) 獨立理財顧問協會有限公司	3115 7616	3115 7630
Insurance Claims Complaints Bureau (ICCB) 保險索償投訴局	2520 1868	2520 1967
Insurance Institute of Hong Kong (IIHK) 香港保險學會	2520 0098	2295 3939
Life Underwriters Association of Hong Kong (LUA) 香港人壽保險從業員協會	2570 2256	2570 1525
Mandatory Provident Fund Schemes Authority (MPFA) 強制性公積金計劃管理局	2918 0102	2259 8806
Motor Insurers' Bureau of Hong Kong (MIBHK) 香港汽車保險局	2866 9681	2866 9536
Office of the Commissioner of Insurance (OCI) 保險業監理處	2867 2565	2869 0252
Professional Insurance Brokers Association (PIBA) 香港專業保險經紀協會	2869 8515	2770 2372
Macau 澳門		
Federation of Macau Professional Insurance Intermediaries	(853) 2870 3268	(853) 2870 3266
Macau Insurers' Association	(853) 2851 1923	(853) 2833 7531
Macau Insurance Agents and Brokers Association	(853) 2833 1661	(853) 2857 0848
Association of Macau Financial Employees	(853) 2856 7541	(853) 2856 7541
China 中國		
深圳市保險中介行業協會(SIIA)	(0755) 8306 7675/ 8306 8161(綜合部)	(0755) 8290 9140



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歡迎以下新會員加入HKCII， 有您的參與絕對能幫助本會的會務發展， 個個都重要，一個都不能少。

公司會員

Full Member (FM)

- 持有效商業登記在香港經營保險中介業務的公司或機構
An organization who carries on business in Hong Kong as an insurance intermediaries under a valid business registration
- 只有「公司會員」之「公司代表」方可作為商會的理事
Only the Nominee of the Full Member shall be a committee member of the Executive Committee of HKCII

Frankfurt Insurance Agency Co. Ltd

Nominee: Ms. Sara Li

Globe Win Wealth Management Limited

Nominee: Mr. Jimmy Kwok Wai Chan

Yicko Sunshine (HK) Limited

Nominee: Mr. Alvin Chong

Cypress Insurance Agency Limited

Nominee: Ms. Leonie Suk Ha Ma

GlobalHealth Asia Limited

Nominee: Ms. Candy Kin Yung Cheung

Jenson Insurance Agency Co.

Nominee: Mr. Kin Man Wan

International Risk Consultant (Asia) Ltd

Nominee: Ms. Joyce Chan

個人聯繫會員

Individual Associate Member (IAM)

- 業務是和保險業相關的個人
A person whose business activities are closely related to the insurance industry

Mr. LEUNG Wing Sen

Mr. Frankie CHENG Ting Fat

Mr. CHAU Chi Ho

李江仁先生

個人會員

Individual Member (IM)

- 在香港從事保險中介業務的個人
An insurance intermediary who carries on business in Hong Kong

Mr. Eddie SO Kwok Kwong

Ms. TANG Ping

Mr. YIM Wing Cheng

Mr. Mark IP Yat Chan

Mr. LI Tian Peng

Mr. CHEN Ye Fei

Mr. YEUNG Chi Sum Sam

Mr. LEUNG Kwok Keung Stanley

Corporate Associate Member (CA)

Liberty International Insurance Ltd

Nominee: Mr. Chris SIU



Apply for membership

Membership Composition 會員類別

• Full member

is an organisation who carries on business in Hong Kong as an insurance intermediary under a valid business registration certificate issued by the SAR Government of Hong Kong and is to be represented by a Nominee of such organisation registered with the Chamber and duly accepted by the Chamber. (A "Nominee" is an Individual Member of the Chamber who is the chief or a very senior executive officer of, and nominated by a Full Member).

Registration fee : HK\$100.- Annual subscription : HK\$600. ~ 1,200.-

• Individual member

is an insurance intermediary who represents himself in person in the Chamber and duly accepted by the Chamber.

Registration fee : Free Annual subscription : HK\$250.-

• Associate member

is a person or an organisation whose business activities are closely related to the insurance industry and duly accepted by the Chamber.

Registration fee : Free Annual subscription : HK\$250.-

• Corporate Associate member

is an organisation whose business activities are closely related to the insurance industry and duly accepted by the Chamber. Corporate Associate Membership is entitled to nominate up to five nominees.

Registration fee : HK\$100.- Annual subscription : HK\$900.-

Membership Benefits 會員權益

- To develop skills and enhance professional knowledge through attending Seminars and or Forums organized by the Chamber from time to time.
- To keep update of the current changes and development in the market place via our regular Newsletters issued to the members.
- To develop contacts and establish relationship in the market via our various fellowship gathering and functions.
- To voice out members' concern to liaise with regulatory bodies for the common interest of insurance intermediaries as a whole.

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- 工作假期保險
- 海外留學生保險
- 高端個人意外保險
- 團體個人意外/旅遊保險
- 僱員自購保險



任何查詢，歡迎致電 **3765 5333** 或電郵 **HK.A&H@Starrcompanies.com**

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Mr. Simon Ip

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名譽法律顧問
Honorary Legal Advisor of HKCII

蘇壽山保險服務有限公司
Simon So Insurance Service Limited



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編者的話

香港保險中介人商會年刊為的是摘錄每一年的工作及其貢獻，一點一滴地收集並記錄當時業界的事物，以留下保險界在香港的足跡。我們力邀當下知名人仕，以不同角度剖析香港保險業的現況，以讓讀者更容易了解相關保險業的發展及前景，所以內容實在非常珍貴而實用。

籌辦年刊是一件龐大及艱巨的工作：資料搜集、招請廣告、撰寫文章、編輯等都要花很多心思及時間，但對於以義務性質工作的理事們卻能以團結及義無反顧的精神去製作、去完成，實在心存感激。

2014年刊與2015展望 Yearbook 2014 & Prospect 2015 編輯委員會 Editorial Board

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會員類別 Type Of Membership

公司會員 (FM) Full Member	(1) 持有效商業登記在香港經營保險中介業務的公司或機構 an organization who carries on business in Hong Kong as an insurance intermediary under a valid business registration. (2) 只有「公司會員」之「公司代表」方可作為商會的理事 Only the Nominee of the Full Member shall be a committee member of the Executive Committee of HKCII.
--------------------------	--

公司資料 Company Information (請提供名片 Please provide name card)

公司名稱： (中文)		
Co. Name: (English)		
地址 Address: (中或英CN/EN)		
公司電話： Co. Tel.	傳真： Fax	電郵： Email
公司性質： Co. Nature	() 代理公司 Co. Agent	() 經紀公司 Broker Firm
		() 其他 Others
成立年份： Established Since	商業登記號碼 (請提供副本)： B/R Number (Pls provide copy)	職員及業務代表總人數 (以本申請表日期計)： No. of Employee & TR (as at date of this application)

公司會員之代表 Nominee of Full Member

中文姓名： (先生/女士)	Name: (Mr./Ms.)	
職位： Position	任職保險年份： Experience in Ins. since	電郵： Email
聯絡電話 (1)： Contact No.	聯絡電話 (2)： Contact No.	傳真： Fax
學歷 / 保險專銜： Academic / Insurance Qualification		
介紹入會者姓名 (如有)： Introducer (If any)	其它媒介 (請指出)： Other media (pls specify)	

通訊名單 (只適用於公司會員) Circular List (Applicable to Full Member only)

請將會員通訊直接發到以下職員及業務代表 (如位置不夠請用附頁) Pls circulate directly to our staff & TR (Use separate sheet if not enough space)

	姓名Name (中英文 CN & EN)	電話Tel.	電郵Email
(1)			
(2)			
(3)			
(4)			

聲明 Declaration

本公司/機構明白此申請書須通過香港保險中介人商會理事會批核方為有效。本公司同意時刻遵守商會制定之規章，以及同意本頁資料可由商會作內部推廣用途。
We understand that the acceptance of this application is subject to the final approval of the Executive Committee of the HKCII. We agree to comply with the regulations as set by the Chamber from time to time. We also agree that the above data can be used for HKCII internal distribution.

- (1) 入會費 Entrance Fee: HK\$ 100
(2) 公司人數 Co. Member 年費 Annual Fee
1 - 5 HK\$ 600
6-25 HK\$ 900
26 + HK\$ 1,200

支票抬頭：香港保險中介人商會 Payable: HK Chamber of Insurance Intermediaries
郵寄地址：香港郵政總局信箱6542號 Postal Address: GPO Box 6542, Hong Kong

公司代表/聯絡人 簽署及蓋章
Chop & Signature of Nominee/Contact Person

商會專用 HKCII use only

Bank:	Cheque No:	Amount: HK\$100 + HK\$	= HK\$
Approval Date:	Handled By:	Remarks:	

會員類別 Type Of Membership

<input type="checkbox"/> 個人會員 (IM) Individual Member	在香港從事保險中介業務的個人 an insurance intermediary who carries on business in Hong Kong.
<input type="checkbox"/> 個人聯繫會員 (IAM) Individual Associate Member	業務是和保險業相關的個人 a person whose business activities are closely related to the insurance industry.

個人資料 Personal Information (請提供名片 Please provide name card)

中文姓名 (先生/女士):	Name (Mr./Ms.):			
任職公司名稱:	Company Name:			
公司性質: Co. Nature	<input type="checkbox"/> 保險公司 Insurer	<input type="checkbox"/> 代理公司 Co. Agent	<input type="checkbox"/> 經紀公司 Broker Firm	<input type="checkbox"/> 其他 Others
職位: Position	電郵: Email			
年齡: Age	<input type="radio"/> 20-35歲 20-35 years	<input type="radio"/> 36-55歲 36-55 years	<input type="radio"/> 56歲或以上 56 years & above	身份證號碼: HKID No
聯絡電話: Contact No.	流動電話: Mobile No.	任職保險年份: Experience in Ins. Since		
地址: Address				
學歷 / 保險專銜: Academic / Insurance Qualification				
介紹入會者姓名 (如有): Introducer (if any)		其它媒介 (請指出): Other media (pls specify)		

聲明 Declaration

本人聲明上列資料乃本人所知一切據實填報，本人明白此申請須通過香港保險中介人商會（“商會”）理事會批核方為有效。本人同意遵守商會制定之一切規章及同意以上資料可由商會作內部推廣用途。本人有權查詢及要求更改由商會持有本人的個人資料，如有此要求，本人可向商理會提出。

I hereby declare that the particulars given above are, to the best of my knowledge and belief, true and complete. I understand that the acceptance of this application is subject to the final approval of the Executive Committee of the Hong Kong Chamber Insurance Intermediaries ("HKCII"). I agree to comply with the regulations as set by HKCII. I understand and agree that above data can be used for HKCII internal distribution. I should that I have the right to obtain access to and to request correction of any personal information concerning myself held by HKCII. Request for such access can be made to the Executive Committee of HKCII.

入會費 Entrance Fee : Nil
年費 Annual Fee : HK\$250

支票抬頭: 香港保險中介人商會 Payable: HK Chamber of Insurance Intermediaries
郵寄地址: 香港郵政總局信箱6542號 Postal Address: GPO Box 6542, Hong Kong

簽署 Signature

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Approval Date:	Handled By:	Remarks:

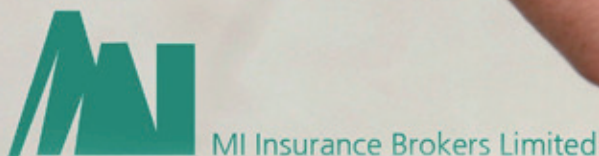
March 2014

香港保險中介人商會綱領

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